

I-Manage User Manual

Business Partner Maintenance Screen

Function

Allows users to add and modify business partners that are not housed by General Motors. Allows users to view business partners that are in the following General Motors data base extracts:

- GM DID Extracts
- Employee Extract
- SPO Customer Records

Security

Access to GM I-Manage and Stakeholder or Business Owner authority.

Common Buttons and Fields

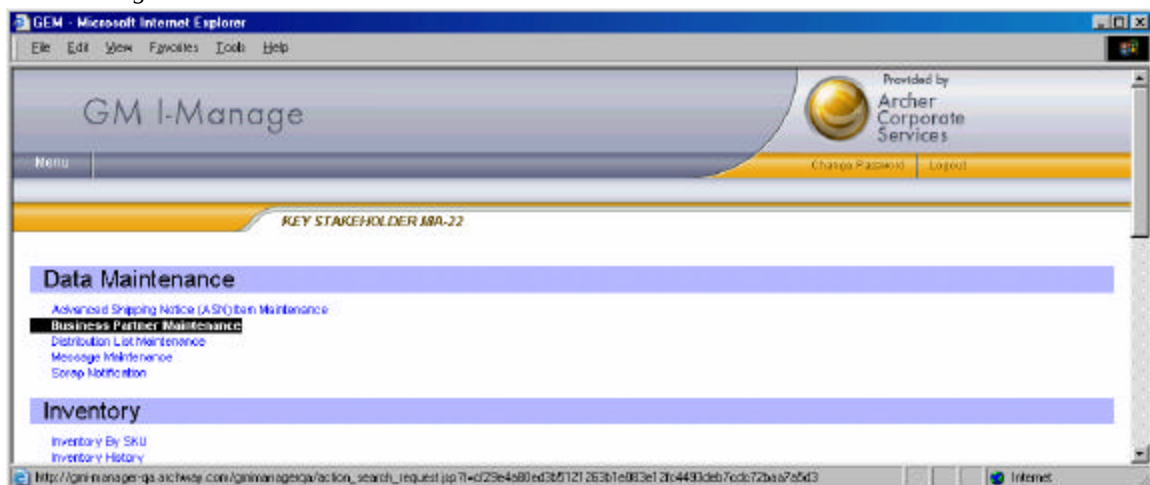
- **Reset** – Clears all the fields on the page
- **Back** – Opens the previous page
- **Save** – Saves information entered into the fields
- **Search** – Starts a search based on the supplied criteria

Operating Instructions

- **Accessing the Business Partner Maintenance**

1. Go to the *GM I-Manage Main Menu*.
2. Under the **Data Maintenance** category, click the **Business Partner Maintenance** option.

GM I-Manage Main Menu



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The *Business Partner Maintenance Screen* will open.

Business Partner Maintenance Screen

GM I-Manage

Provided by Archer Corporate Services

Menu

Change Password Logout

KEY STAKEHOLDER MA-22

Main Menu

Business Partner Maintenance Screen

Create New

Business Partner: [Leave blank for all](#)

Company: [Leave blank for all](#)

Last Name: [Leave blank for all](#)

Zip: (Required for USF)

Type:

Stakeholder: *ALL

Business Unit: *ALL

Region: *ALL

Status: *ALL

Reset Back Search

- **Searching for a Business Partner**

1. On the *Business Partner Maintenance Screen*, complete one or all of the indicated fields.
2. Click the **Search** button. The search results appear at the bottom of the screen.

Business Partner Maintenance Screen – Search Results

Region: *ALL

Status: *ALL

Reset Back Search

Create New

Business Partner	Company	Last Name	First Name	City	Zip	State	Choose Screen	
1 112874	WOODSON JONES CHEVROLET INC	JONES	DALE	FORT PAYNE	350878375	ALABAMA	Address/Contact	60
2 112767	M.A. JONES CHEVROLET-BUICK-OLDSMOBILE, I	JONES	HERBERT	CYNTHIANA	41031	KENTUCKY	Address/Contact	60
3 112957	JOHN JONES CHEVROLET PONTIAC OLDSMOBILE	JONES	JOHN	COBBDON	471321094	INDIANA	Address/Contact	60
4 112960	JOHN JONES CHEVROLET PONTIAC OLDSMOBILE	JONES	JOHN	SALEM	47167	INDIANA	Address/Contact	60

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3. Locate the correct Business Partner you wish to view (you may need to scroll to find the appropriate business partner)

- **Viewing a Business Partners information**

1. Search and locate a business partner you wish to view (see “Searching for a Business Partner”).
2. On the **Choose Screen** drop-down field, select one of the following choices:
 - **Address/Contact** – Provides the business partner’s contact information. This information is read only.

Business Partner Maintenance Screen – Address/Contact

Business Partner Maintenance Screen

Main Menu Search Business... Search Business... User Security P...

Business Partner: MA-77177

Status: Active

Date Status Changed:

Type: NON-EMPLOYEE

Company: BECK'S BROS

Primary Name:

Suffix: JR

First Name: JOSEPH

Middle Initial:

Last Name: BECK

Suffix:

Nick Name: JOE

- **Divisional Information** – Provides the business partner’s GM divisional information.

Business Partner Maintenance Screen

Main Menu Search Business... Search Business...

Business Partner	Company	Last Name	First Name	City	Zip	State
11111	BECK CHEVROLET SAAB	GELLER	RUSSELL	YONKERS	10704297	NEW YORK

GM Divisional Information

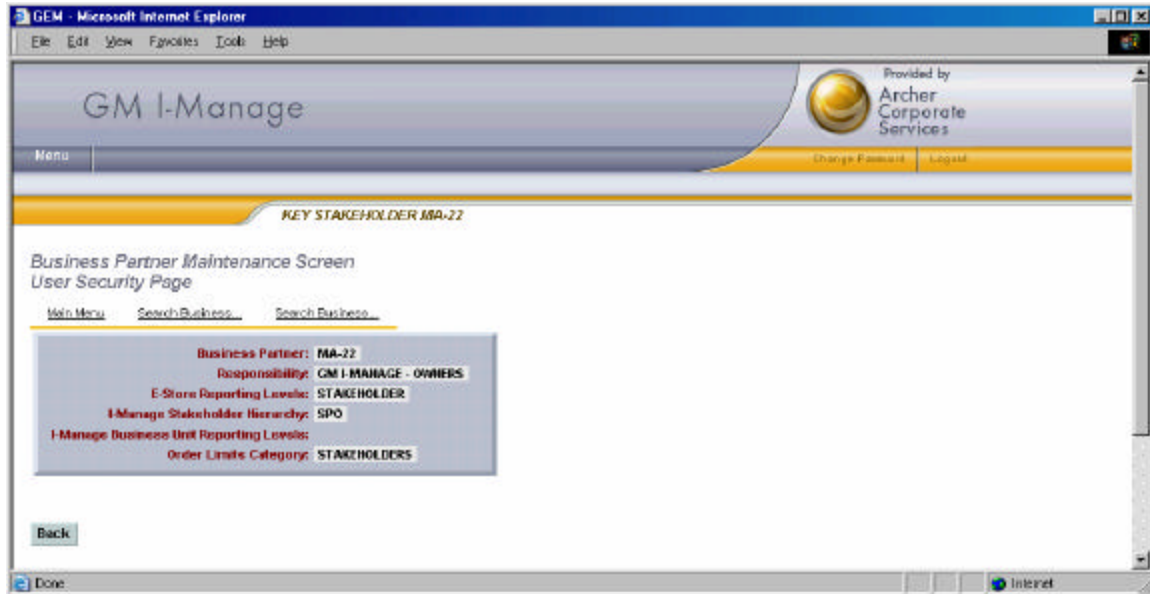
Division	Dealer Code	Status	Effective Date	Termination Date	Passenger Car	Light Duty Truck	Medium Duty Truck
Chevrolet		Active	01/01/1984		Yes	Yes	No

Back

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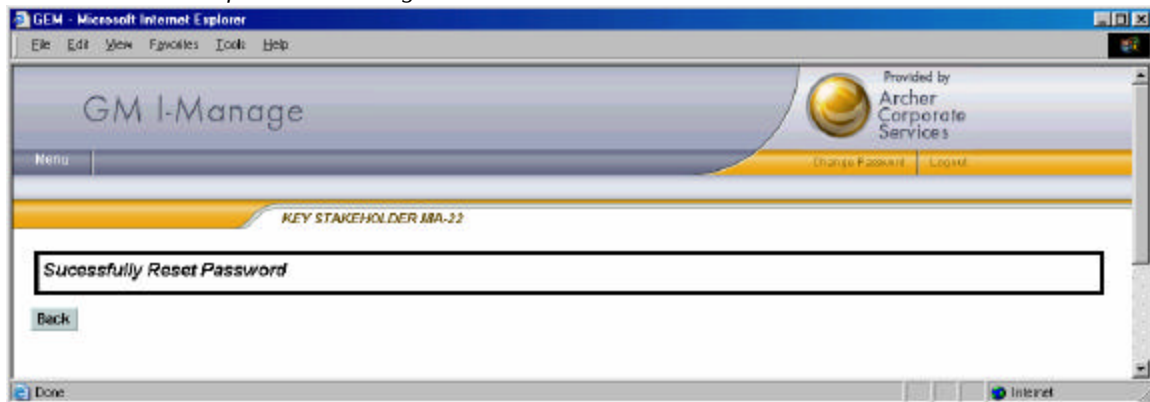
- **User Security** – Shows the I-Manage security level for the selected user. If you are assigned to a security level of this user you will also have the ability to edit their security level. This will be discussed later in this manual.

User Security Page



- **Reset Password** – Allows a Business Owner to reset the password of any individual assigned to their reporting/security level. In the case that an individual forgets their password, the reset button can be utilized to default their password to "WELCOME". It is strongly recommended that the User immediately change their password upon initial access after the reset has occurred (refer to Change Password instruction in the Main Menu section of this User Manual).

Reset Password Confirmation Message



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- **Creating a New Business Partner**

1. On the *Business Partner Maintenance Screen*, click the **Create New** link.
2. Complete the information fields on the new business partner.
 - **Business Partner** – Once the information has been added a Business Partner Number will be systematically assigned.
 - **Status** – Select the business partner status: Active, Inactive
 - **Type** – Once the information has been added a Business Partner Type will be systematically assigned
 - **Company** – Add the name of business partner's company.
 - **Primary, Secondary, Tertiary Name** – Add all the name(s) for the business contact.
 - **Ship-to Address** – Add the address where items are shipped.
 - **Commercial or Residential** – Indicate if the above address is a residential address or a commercial address. This will have implications during the shipping process.
 - **Region/Direct Territory/Zone** - Automatically populated field based on the address information provided.
 - **Telephone Numbers** - Indicate in the appropriate fields the various contact numbers.
 - **Email Address** – The primary email address for this contact.
 - **Source of Address** – Automatically populated field indicating how this business partner was added to the database.
 - **Employee Job Code** – Select the business partner's employee type.
 - **Record Creation Date** – Automatically populated field that records the date the business partner information is saved.
 - **Last Updated Date** – Automatically populated field that records the date the business partner was last updated.
 - **Last Updated By** – Automatically populated field that records the user id of the last person to update the information.
3. Click the **Save** button to add the new business partner. You will see confirmation message indicating the addition of the business partner.

- **Editing an Existing Business Partner**

This is restricted functionality. You can not edit information or security levels on any business partner that is housed within General Motors database. You can edit information on any business partners that you have manually added or that you have been given rights.

To edit a Business Partner from the Business Partner Maintenance Screen

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1. Search and locate a business partner you wish to view (see “Searching for a Business Partner”).
2. On the **Choose Screen** drop-down field, select one of the following two choices and click “Go”.
 - Address/Contact
 - User Security

To edit address/contact information fill in the appropriate fields and click **Save** at the bottom of the screen. A message will appear confirming the changes have been saved.

Address/Contact Information Screen

The screenshot shows a web browser window titled "GM I-Manage" with a menu bar (File, Edit, View, Favorites, Tools, Help) and a status bar (Done, Internet). The page header includes "KEY STAKEHOLDER MA-22" and navigation links: "Main Menu", "Search Business...", "Search Business...", and "User Security P...". Below the header, the "Business Partner Maintenance Screen" is displayed, featuring a "Create New" link. The main form area is titled "Business Partner:" and contains the following fields:

- Status:
- Date Status Changed:
- Type:
- Company:
- Primary Name:
 - Solution:
 - First Name:
 - Middle Initial:
 - Last Name:
 - Suffix:
 - Nick Name:
- Secondary Name:
 - Solution:
 - First Name:
 - Middle Initial:
 - Last Name:
 - Nick Name:

Security Levels

Rights are restricted when editing the security levels of a business partner. Key Stakeholders can edit rights of Business Owners or Owner Representatives. Business Owners can edit rights of Owner Representatives. Owner Representatives can not edit security rights of any business parties.

Rights Definitions

Business Partner Number – Persons EDSNetID or System Assigned Business Partner Number

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Responsibility – Shows the Users security rights to I-Manage and E-Stores

E-Store Reporting Levels – Shows the E-store access rights

I-Manage Stakeholder Hierarchy – Shows the General Motors Division this individual is assigned to.

I-Manage Business Unit Reporting Levels – Show the Business Unit to which the person has access

Order Limit Quantities – Shows the restriction level when ordering fulfillment materials.

If you are a Key Stakeholder:

To edit security levels information the following fields should appear:

- Responsibility
- I-Mange Stakeholder Hierarchy
- I-Manage Business Unit Reporting Level

Responsibility – Choose the appropriate category for the User you have identified.

GM E-store – Non Dealers: Choose this option when the end user will access the E-Store but will NOT have access to I-Manage

GM I-Manage - Owner Rep: Choose this option when the end user will access the DWD E-Store and access I-Manage ASN, Push and Reports only.

GM I-Manage – Business Owner: Choose this option when the end user will access the E-store, access all screens in I-Manage with the exception of Message Maintenance and have the authority to create new users or change existing user security.

GM I-Mange – Stakeholder: Choose this option when the end user will need to access the E-Store, access all screens of I-Manage, and have the ability to create users with Rep, Owner or Stakeholder access.

The page will refresh after you have made your choice. The fields below will change based on the Responsibility you have assigned to the Business Partner.

If you Choose GM E-store Non Dealers the following fields should appear:

Employees - Choose this option when the individual is an employee and will only need access to their specific business units' information.

Non Employees - Choose this option when the individual is not an employee of GM and may need access to multiple business units information.

Order Limits Categories - Employee or Non-Employee

If you Choose GM I Manage – Owners or GM I-Manger - Owner Rep the following field should appear:

I-Mange Stakeholder Hierarchy – Choose the appropriate Division for the User you have identified. (The screen will refresh once you have made this choice.)

- IPC

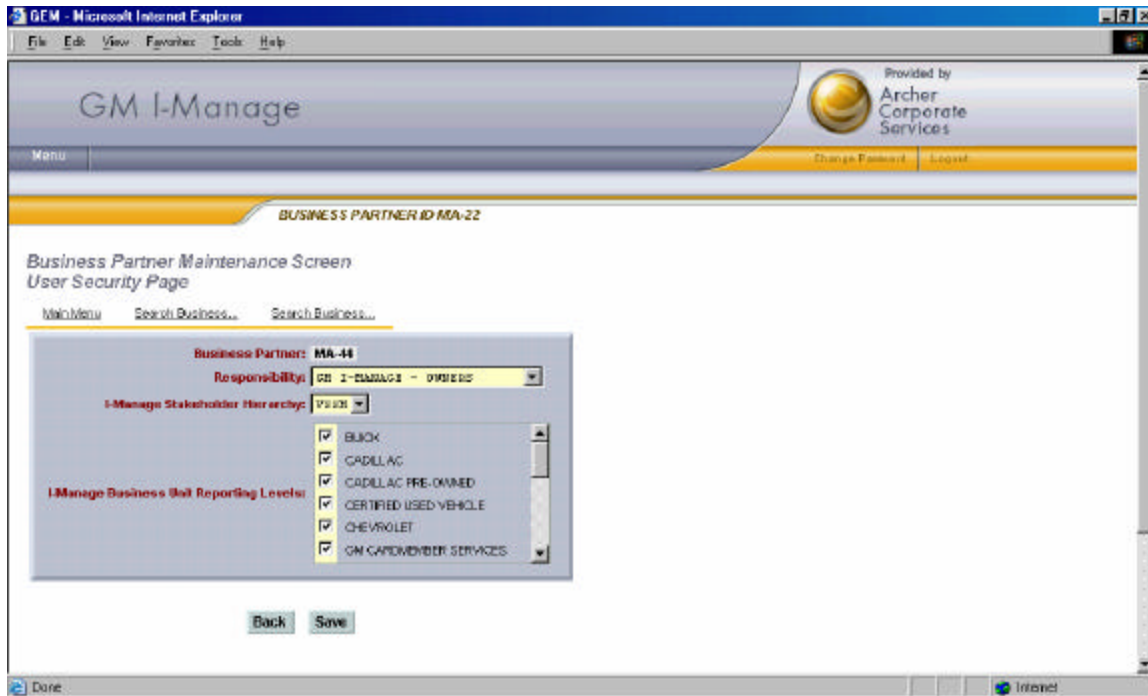
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- SPO
- VSSM

Once you have picked one of the above options, additional dropdowns will appear allowing you to choose the I-Manage Business Unit Reporting levels. You may check all business units that apply.

Click the save button.

User Security Page



A message will appear confirming the security levels have been entered or updated.

If you are a Business Owner:

To edit security levels information the following fields should appear:

Responsibility – Choose the appropriate category for the User you have identified.

GM E-store – Non Dealers: Choose this option when the end user will access the E-Store but will NOT have access to I-Manage

GM I-Manage - Owner Rep: Choose this option when the end user will access the DWD E-Store and access I-Manage ASN, Push and Reports only.

I-Manage Business Unit Reporting Levels –

If you have Chosen an Employee for editing, this field will pre-populate based on the information received from the employee profile. This information can not be edited.

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If you have Chosen an Owner Rep for editing, this field will pre-populate based on the rights of the person adding the Business Partner. Owner Rep responsibilities correlate directly to those of their sponsoring Business Owner.

Business Partner Security Page: Owner Rep

The screenshot shows a web browser window titled "http://archer-i-manage-hn.coln2.archway.com - GM - Microsoft Internet Explorer". The page header includes the "GM I-Manage" logo and a "Provided by Archer Corporate Services" badge. Below the header, there is a "Menu" button and links for "Change Password" and "Logout". The main content area is titled "BUSINESS PARTNER ID MA-22" and "Business Partner Maintenance Screen User Security Page". It features a "Main Menu" section with "Search Business" and "Search Business" links. The "Business Partner: MA-42" is displayed, along with a "Responsibility: GM I-MANAGE - OWNED DEPS" dropdown menu. Below this, the "I-Manage Stakeholder Hierarchy" is shown with a "VSSN" dropdown. The "I-Manage Business Unit Reporting Levels" section contains a list of checkboxes for various GM services: BUCK, CADILLAC, CADILLAC PRE-OWNED, CERTIFIED USED VEHICLE, CHEVROLET, and GM CARDMEMBER SERVICES. At the bottom, there are "Back" and "Save" buttons.

If you have Chosen an Owner Rep
A message will appear confirming the security levels have been entered or updated.

You may view the rights of other individuals within your User Group but will be unable to edit these rights. The following screen will appear with read only privileges. Refer to the Rights Definitions within this section for additional information.

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